



CATHOLIC DAUGHTERS OF THE AMERICAS

California State Court

Unity and Charity



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Dear Worthy Regent, Officers and Members:

The State Board has been receiving inquiries about whether courts should do the Financial Reviews in October. The answer is YES.

Here are some guidelines to help.

1. Treasurer and Financial Secretary meet to go over their books. Treasurer can then fill in the Financial Review Form in pencil. Please use the Review Form that was in your Officers Training folder.
2. Recording Secretary, highlight all the money amounts in your Minutes.
3. Regents, it would be most helpful to get 3 members who have already been part of a financial review, they know what to do.
4. Once the Treasurer and Financial Secretary have balanced, they can drop off their books, (check book, receipt book and bank statements) along with the pencil completed Financial Review Form to one of the committee members. The Recording Secretary should do the same with her Minutes book.
5. The 3 committee members can then set a day, time and location to meet and go over the books and complete the form in ink.
6. District Deputy and book officers need to be on standby in case the committee has any questions.
7. Once completed, the form is to be signed by the 3 committee members. Leave the line blank where the District Deputy is supposed to sign. and then give to your Regent.
8. If these guidelines are followed, the review should not take very long.
9. Regents, please send copies of the Financial Review Form to: National, State Regent, 2nd Vice State Regent, District Deputy and keep a copy for the Court

In Unity and Charity

Mary Bernard
State Regent



Left to right:

Maria Santos-Silva, State Secretary, Tess Chiampas, 1st Vice State Regent, Mary Bernard, State Regent, Mary Beasley, 2nd Vice State Regent, Jo Bryant, State Treasurer .